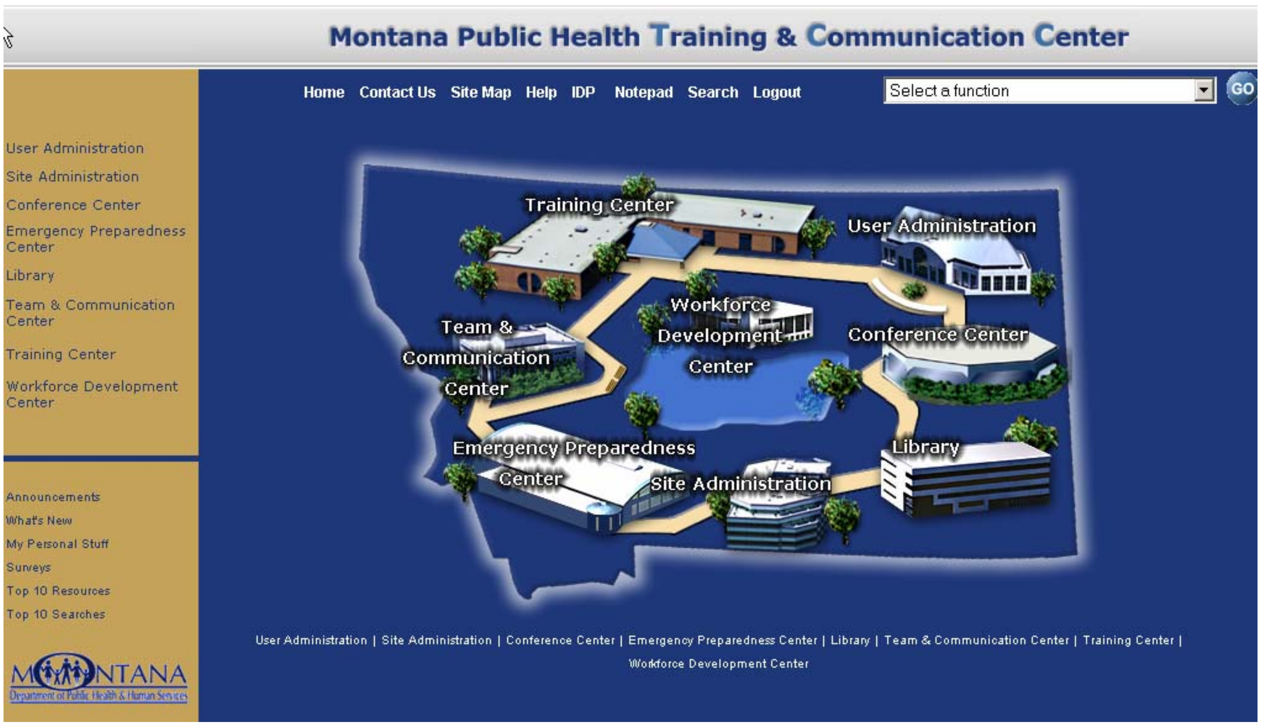
Montana Public Health
Training & Communication Center
(TCC)



User's Guide - Team Rooms

Team and Communication Center

The Team and Communication Center is a collaboration area for TCC users. It contains Team Rooms, which are areas of the TCC where users with a common project / interest / goal can share documents, web sites, BBS forums, and presentations.

Created 2/20/06

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Training & Communication Center (TCC)

User's Guide – Team Rooms

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The following terms are used in relation to the Team Room functions:

- **Public Team Room –** A team room that is open for viewing, participation, and content input by all site users.
- **Moderated Team Room –** A team room that is open for viewing and participation by all site users. Content input is limited to those users identified as Contributors and Owners.
- **Private Team Room –** A team room that is open for viewing and participation by members. Content input is limited to those users identified as Contributors and Owners.
- **Member –** A Member is a user that can view content and participate in a team room. They cannot upload content. They have "read only" access.
- **Contributor –** A Contributor is a user that can view content and participate in a team room, as well as upload content. They have "read and write" access.
- **Team Room Owner –** A Team Room Owner is the Administrator of a Team Room. (There can be more than one – the original owner can add additional Team Room Owners.) Owners can add content and edit content entered by all Contributors.
- **Local Items –** Content uploaded to the Team Room by a Contributor. This content is not available in other locations of the site. Local Content includes: documents, web sites, and presentations.
- **Linked Items –** Site content linked to the Team Room by a Contributor or Team Room Owner. Linked content can only be modified by the content owner (or a Content team member).
- **Item Owner –** The person who originally uploaded or linked an item to the Team Room.

The Teaming Center houses two main functions: *Team Room Management* and *Team Rooms*. These are explained below.

Team Room Management

Team Room Management is where users create new Team Rooms and Team Room Owners can manage the rooms that they administer. Management includes updating the Team Room name, type, and description and granting users permission within the Team Room (either member, contributor, or team room owner). From Manage Team Rooms, Team Room Owners can:

- Administer an existing Team Room
- Close an open Team Room
- Edit information about an existing Team Room
- Manage permissions / users for a Team Room
- Open a closed Team Room

Team Rooms

The Team Rooms function is where users access the Team Rooms they have permissions to participate in. Users search for the Team Room by keyword. Moderated, Private and Private/Classroom Team Rooms are restricted: the Team Room Owner through permissions governs access and participation in these Rooms.

Within a team room, the following features allow users to communicate and share resources:

- BBS – Link to the Team Room forum in the BBS function
- Calendar – Post and share information about events within a Team Room
- Chat Room – Link to the Team Room subject in the Chat Room
- Content – Access to content currently available through the Team Room including:
    - Documents – Documents uploaded for use by the team room
    - Linked Content – Content existing in the Site linked to the Team Room for immediate access
    - Presentations – Microsoft® PowerPoint® presentations uploaded and converted into HTML for access by the Team Room
    - Web Sites – Web sites entered for use by the Team Room

Team Room Permission Descriptions

Access to the different types of Team Rooms is determined by the type of room (Private, Moderated, or Public) and the permissions associated with that room.

The sub sections below detail Team Room permissions.

Member

A Team Room Member has "read only" access to a Private Team Room. They can view any content items and participate in the Chat Room and BBS forum. They cannot add linked or local items to a Team Room. In addition, Members can:

- Access a Team Room
- Participate in Chat and BBS for a Team Room
- View Items in a Team Room

Contributor

A Contributor has "read and write" access to a Team Room. Users who enroll in an integrated classroom based team room are automatically granted Contributor permission to the team room. In addition to having all Member abilities, they can also upload and link local items to a Team Room. All Contributors can edit information about other uploaded items. However, only the Item Owner and the Team Room Owner can remove an item. In addition, Contributors can:

- Edit information about any local items uploaded by other Contributors
- Participate in Chat and BBS
- Remove local items and linked items they added to a Team Room
- Upload items to a Team Room
- View items in a Team Room

Team Room Owner

The Team Room Owner has all the abilities of a Contributor, plus the tools to administer the Team Room. They can edit and remove any local items, remove linked items, edit Team Room information, and manage user participation / access rights. The original Team Room Owner cannot be removed as an owner. Instructors and administrators who create classroom based courses are automatically made Owners of the classroom based team room. All Team Room Owners have the same rights. In addition, Owners can:

- Activate and Hide Team Rooms
- Add and remove Members, Contributors and other Team Room Owners
- Edit information about any local items uploaded by other Contributors
- Manage the Team Room information (name, description, logo, type)
- Open and Close Team Rooms
- Participate in Chat and BBS
- Remove any local or linked item added by any Contributor
- Remove local items and linked items they added to a Team Room
- Upload items to a Team Room
- View items in a Team Room

Details about these functions are presented in the sections below.

Team Room Management

Team Room Management allows you to create and manage Team Rooms, edit information about the Team Room, administer the membership of the team room, and make those team rooms open or closed. These functions are explained in detail in the sub sections below.

Create a Team Room

The **Create New Team Room** link enables users to create private, moderated, or public Team Rooms. The user that creates the Team Room automatically becomes the Team Room Owner.

To ***Create*** a Team Room, perform the following steps:

1. Click the **Create New Team Room** link.
2. Complete the Create Room form by entering data in fields as explained below. *All required fields are marked with an *asterisk.*

*Name	Enter the name of the Team Room.
*Description	Enter the description of the Team Room.
*Keywords	Enter words and phrases used in searches for the Team Room; not shown to users.
*Room Type	Public, Moderated, Private.

3. Click [Submit] to create a team room, ***or***
   Click [Reset] to clear the information in all fields, ***or***
   Click [Cancel] to exit without creating a team room.
4. To ***Review*** your content:
   Proofread your data to make sure it is correct.

To ***Add*** a Team Room:

5. Click [Add] to make the content available in the site, **or**
   Click [Edit] to return to the Team Room Input form to make changes, ***or***
   Click [Cancel] to exit without adding a team room.

Add a Team Room Logo

To ***Add*** a logo to your Team Room, perform the following steps.

1. Click **Edit** for the team room you wish to add a logo. The Team Room Edit Input form appears.
2. Click the **Add Logo** link located at the bottom of the input form.
3. Enter a file name in the File text box, ***or***
   Click [Browse…] to search and navigate through directories to select a file.
4. Click [Upload Logo]. The file is copied to a content folder on your site's server.

Note: After a Team Room is created the ability to add a Team Room Logo is activated.

To ***Update*** a Team Room Logo, perform the following steps:

1. Click **Edit** for the team room for which you wish to update a logo. The Team Room Edit Input form appears.
2. Click **Update Logo** located at the bottom of the input form.
3. Enter a file name in the File text box, ***or***
   Click [Browse…] to search and navigate through directories to select a file.
4. Click [Upload Logo]. The file is copied to a content folder on your site's server and the old logo file is deleted from the content folder.

Close Team Rooms

In addition to creating Team Rooms, Team Room Owners can close and open rooms that they have created. A closed room is "hidden" – not visible or accessible to anyone in the site. Closing a Team Room may be useful to a Team Room owner who wants to add content and review content for the Team Room but does not want to make it available for use.

To ***Close*** a Team Room that you have created, perform the following steps:

1. Check the checkbox for the team room you wish to close, ***or***
   Check the Select All checkbox to close all team rooms.

2. Click [Close Team Rooms]. A confirmation message appears at the top of the page listing the team room(s) that you have closed.

Open Team Rooms

Open Team Rooms are visible to all users of the site and accessible to any registered user of the site (depending on their membership in the team room).

To ***Open*** a Team Room, perform the following steps:

1. Check the checkbox for the team room you wish to open, ***or***
   Check the Select All checkbox to select all team rooms to open.
2. Click [Open Team Rooms]. A confirmation message appears at the top of the page listing the team room(s) that you have opened.

Edit (Team Room)

To ***Edit*** a Team Room, perform the following steps:

1. Click **Edit** on the Team Room Management page for the team room you wish to edit. An Edit Team Room Input Content form appears.
2. Complete the Edit Team Room form by entering data in the fields as explained below.
   *All required fields are marked with an *asterisk.*

*Name	Enter the name of the Team Room.
*Description	Enter the description of the Team Room.
*Keywords	Enter words and phrases used in searches for the Team Room, not shown to users.
*Room Type	Public, Moderated, Private.
Logo	Browse directories to select a graphic file to upload. ***Note****: This field is only active after a team room has been created.*

3. Click [Submit to save the changes,] ***or***
   Click [Reset to reset the form fields with their original information,] ***or***
   Click [Cancel to exit without editing your team room].

To ***Review*** your content changes:

4. Proofread your data to make sure it is correct.

To ***Add*** the updated Team Room:

5. Click [Add] to make the content available in the site, **or**
   Click [Edit] to return to the Input form to make changes, ***or***
   Click [Cancel] to discard all changes.

Administer (Team Room)

The Administer Function allows you to add and remove Team Room Owners, Contributors and Members and collectively email those groups.

To ***Administer*** a Team Room, perform the following steps:

Click **Administer** on the Team Room Management page for the team room you want to administer.

Team Room Owners

To ***Add*** an Owner to a Team Room, perform the following steps:

1. Click **Add Owners**.
2. Type in all or part of a first name or a last name in the text box.
3. Click Search. The results display below.
4. Click **User Info** to display more information about that user.

Select the user(s) that you want to make owners of your team room.

5. Click Add. The user(s) will be added to a list.

6. Click Add Owners once you have completed the list, ***or***
   Click Cancel to exit without adding an owner to your team room.

Note: Applies to Public, Moderated and Private Rooms only.

To ***Remove*** an Owner from a Team Room, perform the following steps:

1. From the Administer Team Room form, select the checkbox for each owner individually or click the Select All box to remove all.
2. Click **User Info** to display more information about that user.
3. Click Remove Owners. A confirmation message appears at the top of the Administer Team Room form.

Team Room Contributors

To ***Add*** a Contributor to a Team Room, perform the following steps:

1. Click **Add Contributors**.
2. Type in all or part of a first name or a last name in the text box.
3. Click Search. The results display below.
4. Click **User Info** to display more information about that user.
5. Select the user(s) that you want to make contributors of your team room.
6. Click Add. The user(s) will be added to a list.
7. Click Add Contributors once you have completed the list.

Note: Applies to Moderated and Private Rooms only.

To ***Remove*** a Contributor from a Team Room, perform the following steps:

1. From the Administer Team Room form, select the checkbox for each contributor individually or click the Select All box to remove all.
2. Click **User Info** to display more information about that user.
3. Click Remove Contributors. A confirmation message appears at the top of the Administer Team Room form.

Team Room Members

To ***Add*** a Member to a Team Room, perform the following steps:

1. Click **Add Members**.
2. Type in all or part of a first name or a last name in the text box.
3. Click Search. The results display below.
4. Click **User Info** to display more information about that user.
5. Select the user(s) that you want to make members of your team room.
6. Click Add. The user(s) will be added to a list.
7. Click Add Members once you have completed the list.

Note: Applies to Private Rooms only.

To ***Remove*** a Member from a Team Room, perform the following steps:

1. From the Administer Team Room form, select the checkbox for each member individually or click the Select All box to remove all.
2. Click **User Info** to display more information about that user.
3. Click Remove Members. A confirmation message appears at the top of the Administer Team Room form.

Email to Owners

The Email to Owners function allows you to send email to all users whom you have made owners of the Team Room. You can send Emails to Owners by performing the following steps:

1. Click **Email to Owners**. A new window opens to display the Send Email form.
2. Complete the Send Email form by entering data in the fields as explained below. *All required fields are marked with an *asterisk.*

CC	Add recipients to be copied on the email message.
BCC	Add recipients to be blind copied on the email message. A BCC recipients name is hidden from other recipients of the email.
Subject:	Enter the Subject line of the email message.

Message:	Enter the message to the students.

3. Click Send. The email is sent to all owners (to the email address in their profile) and any other recipients you added in the optional fields. The Send Email form window automatically closes, ***or***
   Click Reset to clear the information in all fields, ***or***
   Click Cancel to exit without sending an email.

Email to Contributors

The Email to Contributors function allows you to send email to all users whom you have made Contributors of the Team Room. You can send Emails to Contributors by performing the following steps:

1. Click **Email to Contributors**. A new window opens to display the Send Email Form.
2. Complete the Send Email Form, by entering data in fields as explained below. *All required fields are marked with an *asterisk.*

CC	Add recipients to be copied on the email message.
BCC	Add recipients to be blind copied on the email message. A BCC recipients name is hidden from other recipients of the email.
Subject:	Enter the Subject line of the email message.
Message:	Enter the message to the students.

3. Click Send. The email is sent to all contributors (to the email address in their profile) and any other recipients you added in the optional fields. The Send Email form window automatically closes, ***or***
   Click Reset to clear the information in all fields, ***or***
   Click Cancel to exit without sending an email.

Note: *Owners are automatically added to the Contributors group; Owners will receive all emails sent to the Contributors group.*

Email to Members

The Email to Members function allows you to send email to all users whom you have made members of the Team Room. You can send Emails to Members by performing the following steps:

1. Click **Email to Members**. A new window opens to display the Send Email form.
2. Complete the Send Email form by entering data in the fields as explained below. *All required fields are marked with an *asterisk.*

CC	Add recipients to be copied on the email message.
BCC	Add recipients to be blind copied on the email message. A BCC recipients name is hidden from other recipients of the email.
Subject:	Enter the Subject line of the email message.

Message:	Enter the message to the students.

3. Click Send. The email is sent to all members (to the email address in their profile) and any other recipients you added in the optional fields. The Send Email form window automatically closes, ***or***
   Click Reset to clear the information in all fields, ***or***
   Click Cancel to exit without sending an email.

Note: *Owners and Contributors are automatically added to the Members group; Owners and Contributors will receive all emails sent to the Members group.*

Team Rooms

The Team Rooms function allows you to:

- Edit and maintain Web Sites entered for use by the Team Room
- Link Content existing in the site linked to the Team Room for immediate access
- Link to the Team Room forum in the BBS function
- Link to the Team Room subject in the Chat Room
- Post and share information about events and locations with the Team Room Calendar
- Upload Documents uploaded for use by the team room
- Upload Microsoft ® PowerPoint presentations ® (which are automatically converted into HTML) for access by the Team Room

Note: Access to and operation of Team Rooms content and functions depends on the type of team room and what user permissions have been designated by the team room owner(s).

Public Team Rooms

A Public Team Room is a team room that is open for viewing, participation, and content input by all site users.

Note: Accessible to all users, all users may contribute.

Moderated Team Rooms

A Moderated Team Room is a team room that is open for viewing and participation by all site users. Content input is limited to those users identified as Contributors and Owners.

Note: Accessible to all users, selected users may contribute content.

Private Team Rooms

Much like Public and Moderated Team Rooms, Private Team Rooms allow real-time communication through the use of chat rooms and bulletin board systems. Chat rooms are organized by topic and users can select a topic and join an already in-progress discussion of that topic. However, unlike Public Team Rooms, Private Team Rooms allow users to share information and collaborate on a more private level by confining access to only those users with permissions. Private Team Room Administrators may select other registered users as members of their Private Team Room(s).

Note: Restricted to selected users, some selected users may contribute content.

Team Room Home Page

The Team Room Home page is the starting point for accessing content in the Team Room. The title of the Team Room appears at the top of the page above the Team Logo (if one has been applied to Team Room Home page). Other information and options are displayed which further identify the Team Room.

Room Type	Describes the type of Team Room (whether Private, Moderated, or Public).
Description	Descriptive text about the team room.
Owner(s)	Identifies who owns the Team Room (applies to Private, Moderated, or Public Team Rooms). Click **User info** to open a new window with more information about that user. Click **Send email** to open an Email Input form to send email to that owner.
Current Contributors	Identifies selected members of the Team Room who are able to contribute content (applies to Moderated and Private Team Rooms).
Current Members	Identifies selected members of the Team Room (applies to Private Team Rooms).
Options	This function allows group emails to be sent to either All Owners, All Contributors, or All Members (as applicable).

In addition, the Team Room Home Page contains links to the following functions:

- Content
- Calendar
- BBS
- Chat

The following sections explain access to and operation of these functions.

Content

The Content displayed by category links to all content associated with the individual teaming room. The Content categories are:

- Documents
- Presentations
- Web sites
- Linked Content

It may be useful to know before you add content to your Team Room that any content that you do add to a team room can later be shared with users throughout the site. This is useful if you want to use your team room as a collaborative area for creating content and then release it to the entire site.

***Note**: Only Linked Content (which is site content linked to the Team Room Page) has the function* Add to Shortcuts*; Documents, Presentations, and Web sites for Team Rooms are only available in Team Rooms and cannot be added to Personal KC page shortcuts.*

The following sub sections explain access to and operation of the functions of the Team Room Content Page.

Documents

The Documents function is useful for posting and sharing important files with other Team Room users. Instead of distributing documents individually, posting files on one main page saves time so other users can retrieve these documents when they choose to do so.

To ***Add*** a document, perform the following steps:

1. Click **Add Document**. The Add Document Content form appears in the right frame.

Complete the Add Document Content form by entering data in the fields as explained below. *All required fields are marked with an *asterisk.*

*Name	Name of the document being posted.
*Description	Brief description of the document's components.
*Keywords	Key words helpful for performing searches (not viewed by users).
*File	The file name of the document being posted.
*Source	Enter the name of the content provider (person or group).

When finished filling out the form, click Add to post the document. The caption of the button will change to read "Please Wait" while your file uploads. A message appears at the top of the form confirming that the file has been uploaded and displaying the new file name for the document, as it is stored on the server.

Note: Requires Owner or Contributor Permissions for Private and Moderated Rooms; Available to all members of a Public Team Room.

To ***View*** a document, perform the following steps:

1. Click to view specific information about the document.

Click the link of the document to be viewed. The document opens in a new window.
Note: Applies to all users of the Team Room. Documents that have been added as content to the Team Room can be accessed for viewing by any Team Room participant. Team room participants can, through the use of the document's window menu, print or save the document locally to their machine.

Presentations

Presentations are Microsoft® PowerPoint® slide shows that have been added as content to the Team Room for accessing and viewing by all Team Room participants.

To ***Add*** a Presentation, perform the following steps:

1. Click **Add Presentation**.
2. Complete the Add Presentations Content form by entering data in the fields as explained below. *All required fields are marked with an *asterisk.*

*Name	Name of the presentation being posted.
*Description	Brief description of the presentation's components.
*Keywords	Key words helpful for performing searches (not viewed by users).
*File	Name of the presentation being posted.
*Source	Enter the name of the content provider (person or group).

3. When you are finished completing the form, click Add to post the presentation.

A message appears at the top of the page: "Content was linked to Team Room and can now be viewed by all members of this team. Please note that your Microsoft® PowerPoint® Presentation was transformed into HTML format."

Note: Requires Owner or Contributor Permissions for Private and Moderated Rooms; Available to all members of a Public Team Room.

To ***View*** a Presentation, perform the following steps:

1. From the Team Room Content page, click to view specific information about the presentation.
2. Click the link of the presentation to be viewed. The presentation displays in a new window.

Note: Applies to all users of the Team Room.

To ***Delete*** a Presentation, perform the following steps:

1. From the Team Room Content page, click next to the presentation you want to remove.
2. Click **Delete**. A confirmation message appears.
3. Click Ok to delete the presentation, ***or***
   Click Cancel to exit without deleting the presentation.

Web Sites

Web Sites are recent articles and Web sites addressing Team Room-related topics. Only Team Room participants can access these Web sites through links in the Team Room.

To ***Add*** a Web Site, perform the following steps:

1. Click **Add Web Site**. The Add Web Site Content form appears.
2. Complete the Add Web Site Content form by entering data in the fields as explained below. *All required fields are marked with an *asterisk.*

*Name	Name of the Web site.
*Description	Brief description of the Web site.
*Keywords	Key words helpful for performing searches (not viewed by users).
*URL	Enter the full web address. Start the URL with **http:**//, **https:**// or **ftp:**//.

3. When finished completing the form, click Add to post the web site.

A confirmation page appears with the message: "Web site was added to Team Room."

Note: Requires Owner or Contributor Permissions for Private and Moderated Rooms; Available to all members of a Public Team Room.

To ***View*** a Web Site, perform the following steps:

1. Click  to view specific information about the web site.

Click the link of the web site to open a new window to display the web site.

Note: Applies to all users of the Team Room.

Linked Content

Linked Content is any item of site content that has been linked to the Team Room and is therefore available for use by team room participants. Since the source of linked content is site content (unlike Team Room Documents, Presentations, and Web Sites), there is no upload or add function. Instead, it is necessary to search for existing content to add to the Team Room's linked content.

In order to search and select content to add to your team room, follow the directions in the following sub sections.
To ***Add*** Linked Content, perform the following steps:

1. Click **Add Linked Content**. A Search Content form opens on the right.
2. Enter a keyword to search for content. Click Search.
3. Click **View** to display more information about the content item in a new window.
4. Click the checkbox next to each content item you wish to add, ***or***
   Click the Select All checkbox to select all content items.
5. Click Link Content. A confirmation message will appear on the top right.

Note: Requires Owner or Contributor Permissions for Private and Moderated Rooms; Available to all members of a Public Team Room.

To ***View*** a Linked Content item, perform the following steps:

1. Click to view specific information about the linked content item. The Content Type is displayed in [braces] to the right of the content link.
2. Click the link of the content item. The item displays in a new window.

Note: Applies to all users of the Team Room. Since the source of Linked Content is site content (unlike Team Room Documents, Presentations, and Web Sites) the *Add to My Shortcut Button* appears at the top of the information screen on the right.

Calendar

The Calendar tool allows you to interactively post and share information about events within your Team Room. Additionally, this function allows you to post events that you want to schedule and manage on the calendar while providing the additional functionality of informing attendees through email. The Calendar also has a provision for creating online agendas and follow-up meeting minutes. Other features include the ability to create Aliases, which are groups you can create to further direct the scheduling, meeting information through email and Outlook integration, which allows users the ability to save Outlook calendar events locally to Outlook calendars installed on their machines. For integrated classroom based team rooms, the team room calendar will display all scheduled class section events that are also visible on the class calendar.

In order to activate the Calendar, click **Calendar** on the Team Room Home Page (below Linked Content link). The Calendar appears with the current month displayed.

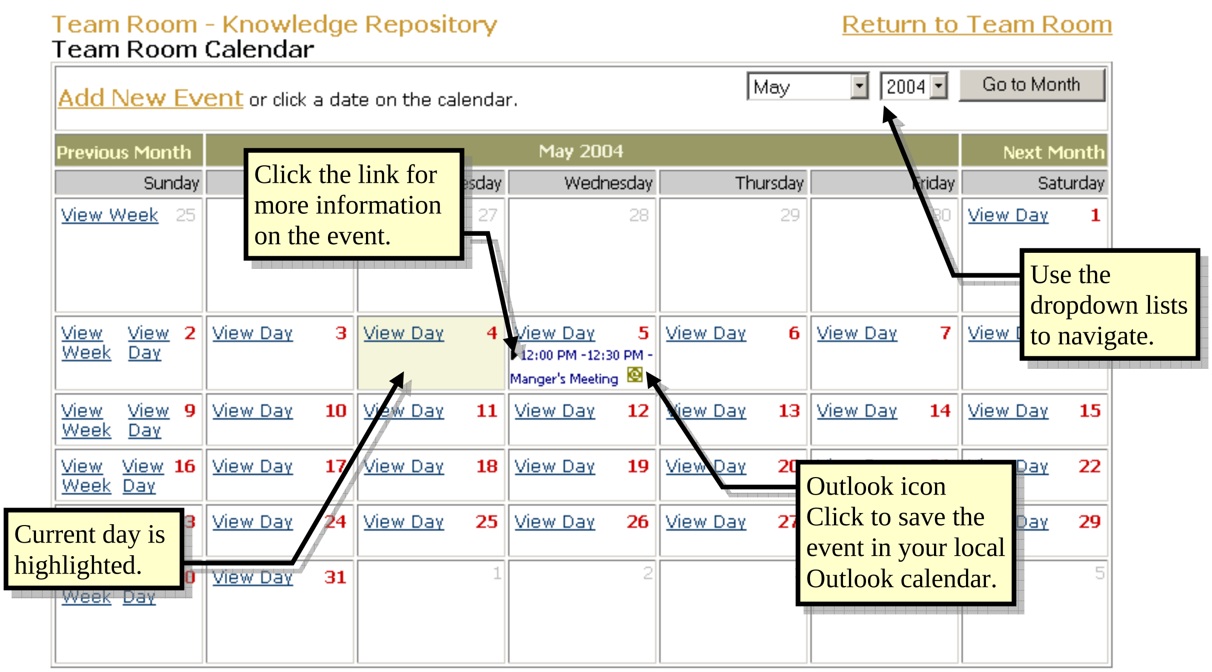

Figure 2-3 Team Room Calendar

The Calendar uses the familiar monthly format to display event titles on the date and time when they occur. Basic functions of the Calendar allow you to:

- Click the Number of the date to activate a Date Event Content form where you can create a new event (such as a meeting or a conference call and so forth).
- Click the event title within the calendar date to activate a content editing form to edit the details of that specific event (such as event tile, attendees, and so forth).
- Click the Prev Month icon to see the previous month.
- Click the Next Month icon to see the following month.
- Click on the Outlook icon in order to save the calendar event to your local machine.

Events

To ***Add*** an Event, perform the following steps:

1. Click **Add New Event** on the Team Room Calendar (Figure 2-3). The Add Event Content form (Figure 2-4) displays in the left frame.
2. Complete the form by entering data in fields as explained below. *All required fields are marked with an *asterisk.*

*Event Title	Enter a title for your event.
Event Summary	Enter a summary for your event.
*Date	Enter a date (Enter date as mm/dd/yyyy), ***or*** Click to activate the calendar control. The calendar displays in a separate frame.
*Times	Enter a start time for your event (if you have a start time you must enter an end time, or select No Specific Time).
*No Specific Time	Required if no specific times are selected above.
Recurrence	Select Daily, Bi-Weekly, Monthly and so forth from the drop down list box.
End Date	Leave blank if it is the same as Date.
*Event Type	Select a type from the drop-down list box.
Location	Enter a location for your event.
Highlight event	Select if you want this event to be highlighted on the calendar.

3. Click Add This Event to add the event to the calendar, ***or***
   Click Reset to clear the information in all fields, ***or***
   Click Cancel to exit without adding the event.

4. Click **Return to Calendar** to return to the calendar.

To ***Update*** an Event, perform the following steps:

1. From your team room calendar, click on the event you want to update.
2. Make edits to the appropriate fields.
3. Click [Update This Event] . A confirmation message appears.
4. Click [Ok] to send an email to the attendees with the changes, ***or***
   Click [Cancel] not to send the email and return to the Event Details Content form.

To ***Delete*** an Event, perform the following steps:

From your team room calendar, click the event you want to remove.

1. Click [Delete]. A confirmation message appears at the top of the screen.
2. Click [Continue] to delete the event, ***or***
   Click [Cancel and Return] to exit without deleting the event.

Figure 2-4 Adding Events to the Team Room Calendar

Team Room Calendar Administration Console

The Administration Console function is available after you have created events. This allows you to:
Create and Maintain Attendee Groups (for meetings and other group events) and Alias Groups
Create and Maintain Agenda Items
Create and Maintain Action Items
Create, Maintain, and Distribute Meeting Minutes
Create and Send emails (to Alias Groups and Event Attendees)

Add an Attendee Alias Group

An Alias is an event group you can create to classify email recipients. The advantage to creating an Alias is that you can create multiple mail lists for each event whose participants you would like to inform by email. For example, if you have regular project meetings, you can create an alias (mailing group) for that project. If you have multiple projects, you can create a different alias for each project you would like to manage and schedule. In this way, you can add members to each alias once and then re-use the alias group as needed.

To ***Add*** an Alias group, perform the following steps:

1. Click **Attendees**. The Attendees Content form displays in the bottom, right frame.
2. Click **Create New Group**.
3. Enter a name for your group in the text field.
4. Click [Create Group].

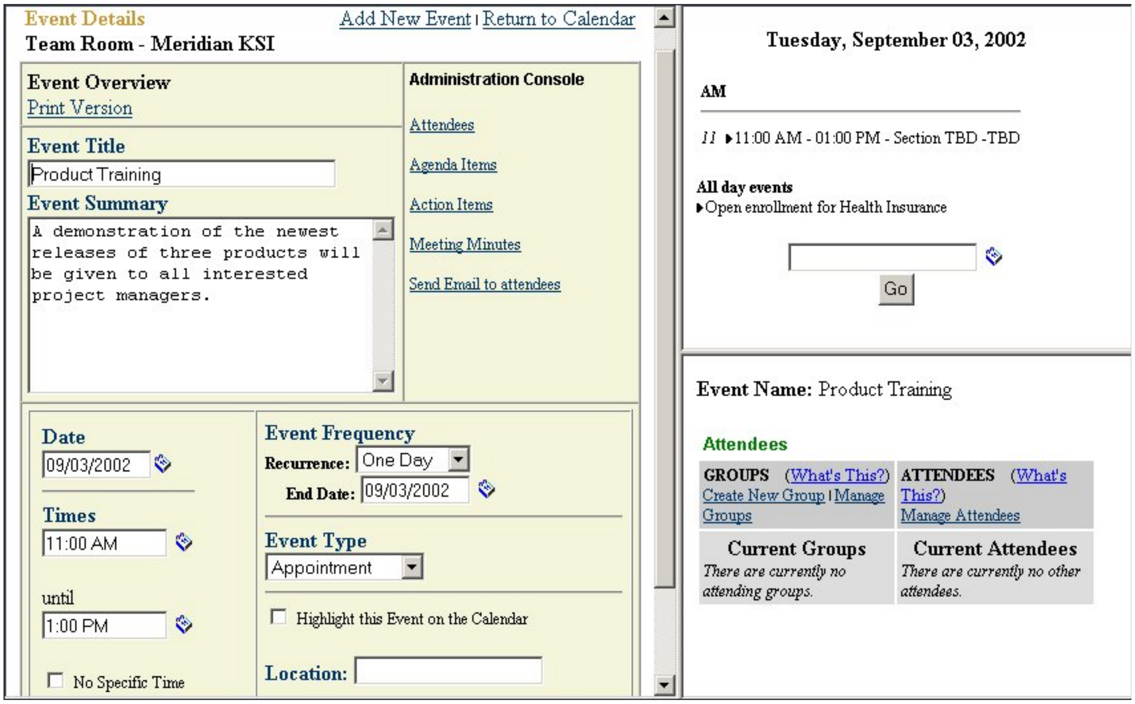

Figure 2-5: Create Group

A confirmation message appears: "The group [group name] was created."

Add Members to an Alias Group

To ***Add*** a Member to an Alias group, perform the following steps:

1. Click **Edit** next to the name of the group you want to add members to.
2. Type in all or part of a last name in the text box.
3. Select an option button (either All Users or Team Room Owners).
4. Click Search. A list of users displays in the frame below.
5. Select the user(s) you want to make members of the alias group.
6. Click Add. The user(s) will be added to the alias group.

Delete Members from an Alias Group

To ***Delete*** a Member from an Alias group, perform the following steps:

1. From the Attendees Content form, click **Manage Groups**.
2. Click **Edit** next to the alias group you want to remove members from.
3. Select the checkbox for each member you want to remove.
4. Click **User Info** to display more information about that user.
5. Click Remove.

Add an Alias Group to an Event

To ***Add*** an Alias Group to an event, perform the following steps:

1. From the Attendees Content form, click **Manage Groups**.
2. Select the checkbox for each group you want to add to this event.
3. Click [Add Groups]. The group name should appear in the Current Groups section.

Delete an Alias Group from an Event

To ***Delete*** an Alias Group from an event, perform the following steps:

1. From the Attendees Content form, click **Manage Groups**.
2. Select the checkbox for each group you want to remove.
3. Click [Remove Groups]. The group name(s) should not be listed in the Current Groups section.

Agenda Items

To ***Add*** an Agenda Item, perform the following steps:

1. Click **Add a new Agenda Item**. The Agenda Content form displays in the bottom, right frame.
2. Enter text in the Agenda Item field.
3. Select a number for the priority value from the drop-down list box.
4. Click [Add] to add the agenda item, ***or***
   Click [Reset] to clear the information in all fields, ***or***
   Click [Cancel] to exit without adding the agenda item.

To ***Edit*** an Agenda Item, perform the following steps:

1. Click next to the agenda item you want to edit. The Edit Agenda Item form displays.
2. Make edits to the appropriate fields.
3. Click [Add] to change the information.

To ***Delete*** an Agenda Item, perform the following steps:

1. Click next to the agenda item you want to remove.
2. A confirmation message appears.
3. Click [Continue] to delete the agenda item, ***or***
   Click [Cancel and Return] to exit without deleting the agenda item.

Action Items

To ***Add*** an Action Item, perform the following steps:

1. Click **Action Items**. The Action Items form displays in the bottom, right frame.

2. Click [Add a new Action Item] to add a new action item to that event. The Edit Action Items Content form displays in the bottom, right frame, ***or***
   Click [Import Agenda Items] to use existing agenda items as an action item. The Action Items Import form appears in the bottom, right frame.
3. Enter text in the Action Items field.
4. Select a number for the priority value from the drop-down list box.
5. Select Highlight this Item to display this item highlighted, ***or***
   Leave un-checked to not highlight this item.
6. Enter a due date (Enter date as mm/dd/yyyy), ***or***
   Click to activate the calendar control. The calendar displays in a separate frame.
7. Select the **Complete** check box to display this item as completed, ***or***
   Leave un-checked if it is not yet completed.
8. Click Add to add the action item.
   Click Reset to clear the information in all fields.
   Click Cancel to exit without adding the action item.

Note*: You cannot delete an action item that has child items associated with it.*

To ***Delete*** an Action Item, perform the following steps:

1. Click next to the action item you want to remove. A confirmation message appears.
2. Click Continue to delete the action item, ***or***
   Click Cancel and Return to exit without deleting the action item.

To ***Edit*** an Action Item, perform the following steps:

1. Click next to the action item you want to remove. The edit Action Item form appears.
2. Make edits to the appropriate fields.
3. Click Add to update the action item, ***or***
   Click Reset to reset the fields with the original information, ***or***
   Click Cancel to exit without editing the action item.

Note: Once you have created an Action Item, the option to assign a person to that action item is available to you.

To ***Assign*** an Action Item, perform the following steps:

4. Select the option button next to the name of the person you want to assign the action item to.
5. Click Assign to assign the action item, ***or***
   Click Reset to reset the option buttons, ***or***
   Click Cancel to exit without assigning the action item.

To ***Change*** an Action Item assignment, perform the following steps:
1. Click next to the action item assignment you want to change.

2. Select the option button next to the name of the person you want to change the assignment to.
3. Click Assign to assign the action item, ***or***
   Click Reset to reset the option button to the previous assigned person, ***or***
   Click Cancel to exit without changing the action item assignment.

Note: You must add Attendees to your event to be able to assign Action Items.

Meeting Minutes

To ***Add*** Meeting Minutes, perform the following steps:

1. Click **Meeting Minutes**. The Meeting Minutes Content form displays in the bottom, right frame.
2. Click **Add a new Meeting Minutes Item** to add a new meeting minutes item to that event. The Meeting Minutes Items Content form displays in the bottom, right frame.
3. Enter text in the Meeting Minutes Items field.
4. Select a number for the priority value from the drop-down list box.
5. Click the Highlight this Item check box to display this item as highlighted, or Leave un-checked to not highlight this item.
6. Select a parent for this item from the list of available parent items.
7. Click Add to add meeting minutes, ***or***
   Click Reset to clear the information in all fields, ***or***
   Click Cancel to exit without adding meeting minutes.

1. To Edit Meeting Minutes, perform the following steps:
2. Click . The Edit Meeting Minutes form appears.
3. Make edits to the appropriate fields.
4. Click Add to change the information.

To ***Delete*** Meeting Minutes, perform the following steps:

1. Click next to the meeting minutes item you want to remove. A confirmation message appears.
2. Click Continue to delete the meeting minutes item, ***or***
   Click Cancel and Return to exit without editing the meeting minutes.

Send Email to Attendees

To ***Send*** an email to the Attendees, perform the following steps:

1. Click **Send Email to Attendees**.
2. Click Ok to send the email to everyone on the attendees list. A copy of the email displays in the top, right frame, ***or***
   Click Cancel to exit without sending the email.

Bulletin Board System (BBS)

The Bulletin Board System (BBS) allows users to post messages. Other users are able to read these messages and respond directly to them.

To enter the Bulletin Board System, click **BBS**.

To ***Create*** a new message, perform the following steps:

1. Click the Start a New Thread icon.
2. Enter the subject of the new message in the Subject text box.
3. Enter the message in the Message text box.
4. Click Post to publish the message, ***or***
   Click Cancel to exit without posting a message.

To ***Read*** messages, perform the following steps:

1. Click which message to read under the name of the Team Room.
2. Click on different messages to continue reading posted topics.

To ***Reply*** to a message, perform the following steps:

1. Click which message to reply to. The message will be highlighted in red.
2. Click the Reply icon.
3. Type your message.
4. Click Reply to publish the message, ***or***
   Click Cancel to exit without posting a message.

Chat Rooms

Chat Rooms are virtual spaces for users to communicate in real-time. Organized into subjects, users select a chat topic and join an in-progress dialogue of other users currently in that Chat Room.

To ***Participate*** in a Chat, perform the following steps:

1. Click **Chat**.
2. Type your comment in the lower text box of the chat area.
3. Click Say, Whisper, Think, or Action. Icons explained at the top of the chat area represent these commands.
4. Click Exit Chat when you are ready to exit the chat area, ***or***
   Click Enter Chat if you are disconnected from the chat area and want to re-enter chat, ***or***
   Click Cancel to exit the chat area.